

WHAT IS CLAIMED IS:

1 1. A method of facilitating enterprise change

2 comprising:

3 treating two or more information systems as a single
4 logical information system to execute pre-change due diligence
5 and post-change integration of an enterprise change, wherein
6 the enterprise change is at least one of a merger and
7 acquisition; and

8 providing a user interface to allow a user to conduct a
9 synergy realization

1 2. The method of Claim 1 further comprising allowing
2 the user to conduct a merger-related activity with at least
3 one of a software task, a software technique, and a software
4 interface, wherein the software interface includes a graphical
5 user interface.

1 3. A method comprising:

2 generating a single logical physically distributed
3 information system across one or more information systems of
4 at least two enterprises, wherein the enterprises are being
5 combined; and

6 providing a user interface to access the single logical
7 physically distributed information system, the single logical
8 physically distributed information system executing one or
9 more pre-merger activities, merger activities, and post-merger
10 activities, the merger activities including a synergy
11 realization.

1 4. The method of Claim 3 wherein the user interface is
2 adapted to at least one of a role of the user and a phase of
3 the merger, the user role including a role of a merger member.

1 5. A system for implementing a merger of at least two
2 organizations, the system comprising a software product and an
3 interface for a user to edit synergy information for at least
4 one of the organizations.

1 6. The system of Claim 5 wherein the software product
2 comprises reference modules adapted for merger teams, the
3 reference modules including checklists, deliverables, project
4 plans, tasks, resources, and assignments.

1 7. The system of Claim 5, wherein the interface
2 comprises information for a financial impact, an indicator of
3 a priority level for an issue, a scale of measurement for
4 synergy realization, and a selector for approval of one or
5 more synergies and one or more risks.

1 8. A system for planning a merger of at least two
2 organizations, the system comprising a synergy realization
3 user interface, the synergy realization user interface
4 including a synergy targets section, a risks section, and a
5 sub-deliverables section.

1 9. The system of Claim 8, wherein the synergy
2 realization interface further comprises a section for merger-
3 related alerts, news, and messages, the synergy targets
4 section including a synergy and an initiative, the risks
5 section including a risk level impact, the sub-deliverables
6 section including sub-deliverables and deadlines, the synergy
7 realization interface further including one or more links.

1 10. The system of Claim 8 further comprising a panel
2 adapted to present merger-related views, the panel including a
3 link to a file space view, a link to a methodology view, a

4 link to a view of research and reports, and a link to a view
5 of a merger log.

1 11. The system of Claim 8 further comprising an
2 interface for a synergy category, the interface for a synergy
3 category including an identified value, a list of objects, and
4 a checklist of integration issues, the identified value
5 including a financial impact, the list of objects including
6 research information, reports, and financial information.

1 12. A system comprising:
2 an interface adapted to present a financial checklist
3 relating to an organization in a merger of at least two
4 organizations the financial checklist including a risk and a
5 synergy, the interface including a button adapted to add an
6 item to the checklist, and a button to delete an item from the
7 checklist; and

8 one or more lists of legal data, accounting data, and
9 data internal to at least one of the organizations.

1 13. The system of Claim 12 wherein the interface further
2 comprises a synergy type, a synergy title, a synergy owner,
3 and a synergy financial impact.

1 14. A system for planning a merger of at least two
2 organizations, the system comprising one or more synergy-
3 related interfaces presenting at least one of merger financial
4 information, a merger risk, a description of a merger risk, a
5 description of a synergy, a log of a plurality of merger
6 actions, and an interface for one or more user actions related
7 to the merger.

1 15. The system of Claim 14 wherein the merger financial
2 information comprises a budget, a return on investment, a cost

3 savings, an estimated impact, an actual impact, and financial
4 resources.

1 16. The system of Claim 14 wherein the one or more user
2 actions comprise an approval action, a rejection action, a
3 cancellation action, and a storing action.

1 17. A system for planning a merger of at least two
2 organizations, the system comprising a user interface a layer
3 of merger application logic services, and tools for sales-
4 related synergies of at least one of the organizations.

1 18. The system of Claim 17 wherein the system further
2 comprises one or more interfaces for sales integration,
3 account transitions, file sharing, discussions, deliverables,
4 and calendars.